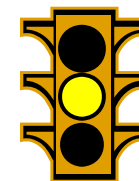




CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



STRATEGIC GOALS

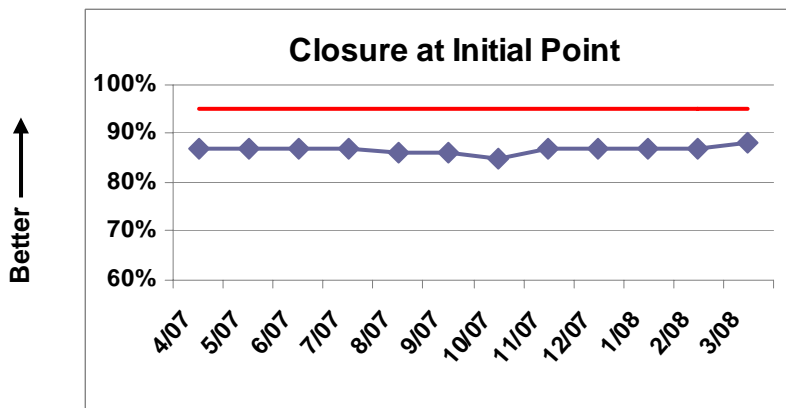
- II. Foster a work environment that values quality, respect, diversity, integrity, openness, communication and accountability.*
- III. Sustain a high performance work culture utilizing staff development, technology, and innovative leadership and management strategies.*

MEASURE:

Percent of telephone inquiries closed at initial point of contact.

Closure at Initial Point of Contact

Target: 95%



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	87%	86%	86%	85%	87%	87%	87%	87%	88%			
2006/07	87%	87%	86%	89%	94%	88%	88%	88%	87%	87%	87%	87%

INITIATIVES: *Improve staff training and knowledge*

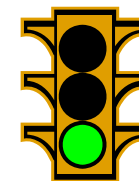
Initiatives	Milestones
<ul style="list-style-type: none"><i>Increase knowledge level of phone agents to answer member questions.</i><i>Increase retention of skilled employees.</i>	<ul style="list-style-type: none">By 12/31/07, develop a formal training plan to provide second level in-depth program knowledge and other advanced skills for CSED staff entering the RPS level, and by 6/30/08 launch the plan.

COMMENTS:

- This dashboard is coded yellow again this past quarter because we anticipate further improvements as staff experience increases.
- Second level training plans have been identified although it is expected that ETM and PSR related training will encroach on these efforts by late 2008.

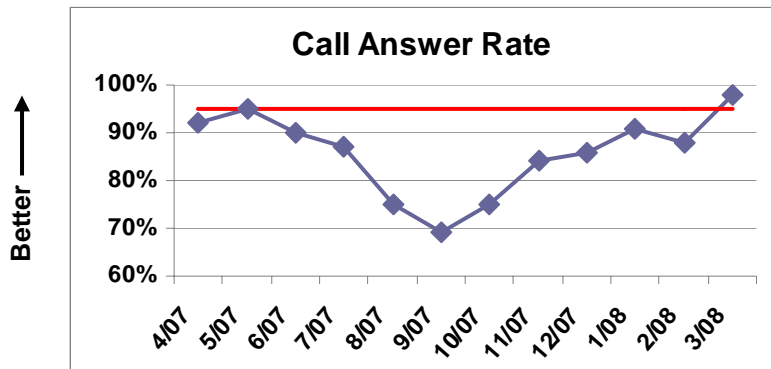


CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.



MEASURE:

Answer before the caller abandons call, due to wait time.

Call Answer Rate

Target: Answer 95% of calls received.

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	87%	75%	69%	75%	84%	86%	91%	88%	98%			
2006/07	88%	89%	80%	84%	94%	94%	97%	92%	92%	92%	95%	90%

INITIATIVES: *Improve Customer Service*

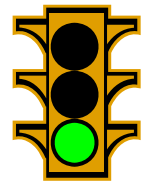
Initiatives	Milestones
<i>Provide additional options to members for long wait time.</i>	<ul style="list-style-type: none">Fourteen additional RA and student phone agent staff completed training in February 2008 and began taking calls.A new flexible staff scheduling process was implemented in February 2008.A large hiring and training effort to fill fourteen vacant permanent phone agent positions was well underway in March.By March 31, 2008, review and assess wait times and customer satisfaction based upon use of the callback feature.

COMMENTS:

- The call answer rate has improved. We anticipate sustained success based on the following factors:
 - Addition of retired annuitants
 - Call back feature
 - Effective workforce management, including the new scheduling process
 - Addressing high vacancy rate (averaging 12, was as high as 14 this quarter)
- Although the callback feature enabled us to turn around our service levels, the months of February and March are a reflection of staff teamwork – the callback feature was only utilized the first few days of each month.



CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD

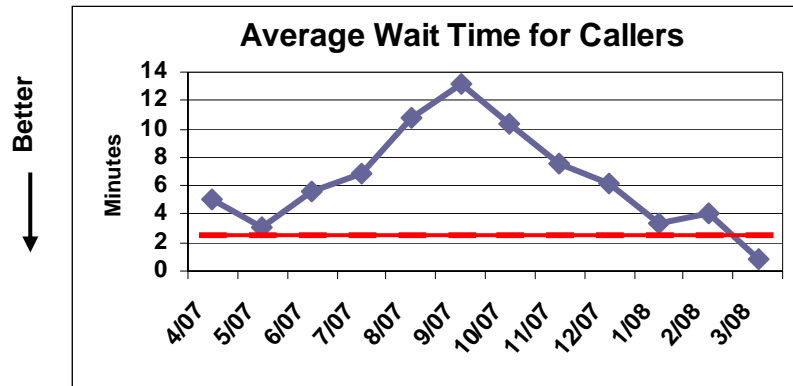


STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

MEASURE:

The length of time the callers wait for an agent after leaving the Interactive Voice Response (IVR) system and entering the queue.



Average Wait Time

Target: Answer calls within a monthly average of 2 minutes and 30 seconds.

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	6:55	10:49	13:10	10:19	7:37	6:08	3:25	4:03	0:47			
2006/07	6:29	5:42	10:30	7:34	3:53	3:37	2:37	4:50	5:10	5:04	3:04	5:39

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
<i>Provide additional options to members for long wait time.</i>	<ul style="list-style-type: none">Fourteen additional RA and student phone agent staff completed training in February 2008 and began taking calls.A new flexible staff scheduling process was implemented in February 2008.A large hiring and training effort to fill fourteen vacant permanent phone agent positions was well underway in March.By March 31, 2008, review and assess wait times and customer satisfaction based upon use of the callback feature.

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CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

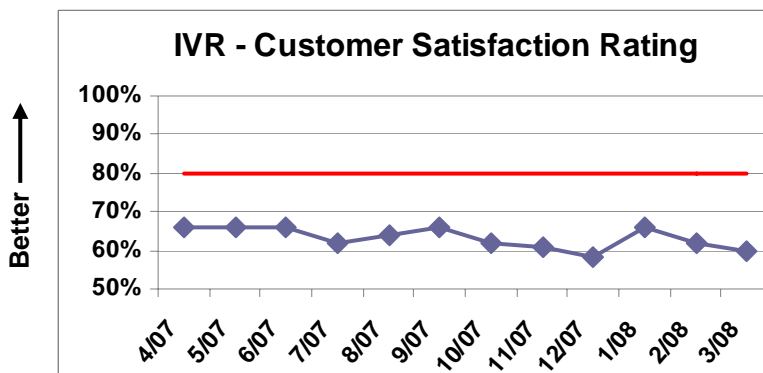
VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Receive overall customer satisfaction rating for the Interactive Voice Response (IVR) system.

IVR Customer Satisfaction Rating

Target: 80% Rating



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	62%	64%	66%	62%	61%	58%	66%	62%	60%			
2006/07	66%	66%	64%	66%	68%	66%	66%	68%	66%	66%	66%	66%

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
<i>Evaluate and improve the IVR system so it is more user friendly for members.</i>	<ul style="list-style-type: none">By December 31, 2007, identify additional improvements based upon the outcome of the assessment.By June 30, 2009, in conjunction with implementation of the PSR project, provide member authentication on the IVR. Accenture OpportunityBy September 30, 2009, in conjunction with PSR implementation begin to provide self service opportunities on the IVR comparable to services provided on the web. Accenture Opportunity

COMMENTS:

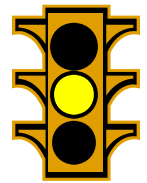
- Although some improvement is shown in January, since the average rating for the quarter has improved only slightly, we are leaving this dashboard coded red.
 - The current satisfaction rating of 3.16 out of 5 (for the quarter) is neither "very satisfied" nor "dissatisfied" according to the survey card rating scale. The average rating last quarter was 3.12.
 - Only 158 surveys were received in March. A total of 2,435 have been received for the quarter.
- The results appear to reflect a growing overall customer dissatisfaction with IVR systems in general. We receive a lot of feedback from customers who want to be able to speak to a live person without going through the IVR system.
- A decision has been made to streamline redesign of the IVR system to limit it to self service capabilities only.
- A service request has been submitted to obtain cost estimates to remove dialogue modules from the IVR system and only provide modules with self service features.
- We only survey callers who speak to an agent -- customers who complete their transaction in the IVR are not surveyed.

3rd Quarter 2007-08

ATTACHMENT B-4



CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



STRATEGIC GOALS

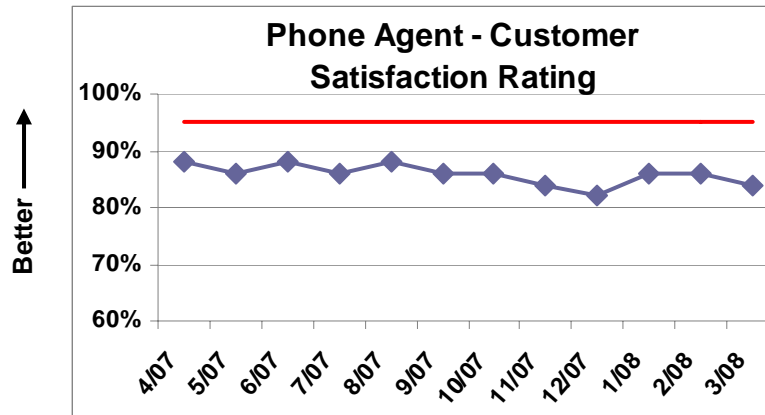
V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

MEASURE:

Establish customer satisfaction rating.

Phone Agent Customer Satisfaction Rating

Target: 95% Rating



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	86%	88%	86%	86%	84%	82%	86%	86%	84%			
2006/07	86%	86%	88%	88%	88%	88%	88%	88%	88%	88%	86%	88%

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
<ul style="list-style-type: none"> • Provide additional options for members who face long wait times. • Manage workforce to meet customer demand during peak periods. • Improve agent customer service skills through formal training and professional coaching. 	<ul style="list-style-type: none"> • Fourteen RA and student phone completed formal training February 2008. • By March 1, 2008, recruit, hire and train 2 additional Quality Assurance coaches. • By March 31, 2008 review and assess wait times and customer satisfaction based upon use of the callback feature. • By April 30, 2008, recruit, hire and train 14 permanent phone agent staff to fill vacancies.

3rd Quarter 2007-08

COMMENTS:

- With results similar to last quarter, we are keeping this dashboard coded yellow.
- We anticipate this rating will climb some as our large number of new staff gain experience and as we maintain improved service levels.
- Two additional Quality Assurance staff have been hired to improve the QA to staff ratio to help ensure more consistent coaching. The QA program delivers regular and ongoing professional coaching for all phone agents that is centered around customer service best practices.
- Customer feedback regarding the callback feature has been consistently positive. In March there was very little utilization due to low wait times.
- The current satisfaction rating reflects an average rating for the quarter of 4.3 out of 5.
- This rating is based upon the following question: *Regarding our customer service agent you talked with, how satisfied were you with that agent's:*
 - Knowledge of CalPERS benefits and programs (4.2 / 5)
 - Understanding of the reason you called (4.3 / 5)
 - Timely and efficient processing of your transaction or question (4.1 / 5)
 - Politeness and professionalism (4.5 / 5)